

# **How to Succeed With Volunteers-In-Parks**

60-Minute Module Series

## **PERFORMANCE REVIEWS** **Training Guide**

**National Park Service  
Volunteers-In-Parks Program**



# **How To SUCCEED With VOLUNTEERS-IN-PARKS**

## **60-Minute Module Series**

Introduction  
Program Planning  
Needs Assessment  
Motivation  
Designing Jobs  
Recruitment  
Interviewing  
Orientation  
Training  
Safety Management  
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Delegation  
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# INTRODUCTION

The idea of conducting performance reviews of volunteers is sometimes met with strong resistance. You may hear, “We’re getting too formal,” “Volunteers will be scared off,” “We don’t have the time or skills to do them,” or “How could we ever initiate this with our current volunteers?”

Countering these reflections are a growing number of VIP Program Managers who see performance review as a reflection of the importance of our volunteers. It is a mutual way to express appreciation, identify problems and needs, determine the volunteer’s future involvement in the organization, and hold the volunteer and the National Park Service accountable for their commitment to one another. Increasing numbers of volunteers are seeking to develop and enhance their skills through volunteer work and thus are welcoming opportunities to receive constructive feedback and evaluation of their work.

A formal performance review process should already be in place for paid staff prior to establishing a similar process for volunteers. Initiating a volunteer performance review system should be gradual and sensitive to concerns and issues of existing staff and volunteers. Often, the development of a self-assessment tool is the first step toward having volunteers begin to take a critical look at their accomplishments. Stressing the mutual benefits of the experience may be most poignantly noted by remembering that volunteers can and do “fire” organizations when they are not satisfied. Both parties, the park and the volunteer, have concrete information to use as they evaluate the success of this partnership, if they have initially agreed to (1) clear success measures for the volunteer job, and (2) the support and training that will be given to the volunteer by the park.

# PURPOSE AND LEARNING OBJECTIVES

The **Purpose** of this module is to introduce or enhance a park's performance review of volunteers.

## Learning Objectives

Upon completion of this module, participants will be able to:

1. Define a volunteer performance review process that fits into the total supervision and support process of the NPS.
2. Develop an understanding of the purposes, benefits and barriers of instituting or enhancing a performance review process.
3. Examine a suggested process and tools for performing the review.
4. Explore the potential outcomes of performance reviews.

# GENERAL NOTES TO TRAINER

1. This workshop is in a suggested format. Feel free, however, to personalize it with your own stories. Also, phrase questions and activities in a manner most attuned to your participants.
2. Be prepared to experience resistance on this topic. It is still controversial, but more volunteer managers are discovering the positive impact that performance reviews can have on the volunteers and the park when they are performed effectively.
3. This workshop deals with both attitudes towards performance review and a process to apply it to the volunteer program. You will need to judge whether the entire workshop can be delivered effectively in the allotted time frame. Suggestions for breaking it into several sessions are given in the “Suggestions for Expanded Activities” section found after the Trainer’s Notes for this module.

# WORKSHOP OUTLINE

Transparency Handout	Section	Method of Presentation	Time
<b>T-1 H-1</b> <b>T-2</b> <b>T-3</b>	<b>Introduction</b> Activity Introduction Learning Objectives Key Concepts	Presentation Group Interaction	10 minutes
<b>T-3 H-1</b> <b>T-4 H-2</b>	<b>Concept 1</b> Definition of volunteer performance review	Presentation Individual Response	8 minutes
<b>T-3 H-1</b> <b>T-5</b> <b>T-6</b>	<b>Concept 2</b> Benefits/Barriers	Interactive Presentation	12 minutes
<b>T-3 H-1</b> <b>T-7 H-3</b> <b>T-8 H-4</b> <b>T-9 H-5</b>	<b>Concept 3</b> Process of performance review	Presentation	8 minutes
<b>T-3 H-1</b> <b>T-10 H-6</b> <b>T-11 H-7</b> <b>T-12 H-8</b> <b>T-13 H-9</b>	<b>Concept 4</b> Outcomes of performance reviews	Presentation	10 minutes
<b>T-3 H-1</b> <b>T-4</b>	<b>Summary/Wrap-Up/ Evaluation</b>	Summary Remarks	3 minutes

**TOTAL TIME: 60 minutes**

# TRAINER'S NOTES

## INTRODUCTION

**Time: 10 minutes**

### T-1: Evaluation

Introduce the topic with the following activity:

For 2 minutes have participants share any words that come to mind when they hear/see the word: **Evaluation**. (You may wish to write words on **T-1**.)

#### **Anticipated reaction:**

Generally, there will be an overwhelmingly negative reaction to the word (e.g., powerless, adversarial, boss, school, uncomfortable). Occasionally, more positive words will suggest growth, challenge, affirmation.

#### **Debrief**

Many people have had negative experiences with evaluation in their life. Ask participants to open their minds to a new view of performance evaluation — a **review** of performance which is intended to be an affirming event, not one to be feared, ignored or avoided.

### T-2: Learning Objectives

Share a few introductory comments on performance review and share **T-2**, the Learning Objectives of this session.

### T-3: Key Concepts

This workshop is built on **four Key Concepts**.

### H-1: Key Concepts

Share **T-3** and **H-1** and indicate that each concept will be covered in the seminar.



## CONCEPT 1

**Time: 8 minutes**

**Successful performance reviews provide an opportunity for constructive feedback between the person who assigns work and the volunteer who performs it.**

### **T-3: Key Concepts**

### **H-1: Key Concepts**

### **T-4: Essential Elements of Volunteer Performance Reviews**

### **H-2: Volunteer Performance Reviews**

#### **Presentation:**

Performance reviews should be non-threatening, constructive, supportive, flexible and empowering. They should aim to encourage the volunteer to stretch for high standards and determine where the organization can help the volunteer achieve his/her goals.

#### **Essential elements for success:**

1. As they enter the organization, volunteers should be apprised of the feedback system, including the system of performance review.
2. The performance review is a time for both the volunteer and the supervisor to share their experience, with one another, in the organization.
3. Performance reviews should be based on previously agreed upon standards, job description, tasks, deadlines, available resources, intervening circumstances, etc.
4. The performance review should have no surprises if ongoing supervision and conflict resolution have taken place.
5. Depending on the size and culture of the park, the process can be formal or informal.
6. It is best to gradually include current volunteers who have not previously been reviewed. Self-assessment may work best as the system is initiated.
7. Performance reviews should be scheduled for a specific time.

## CONCEPT 2

**Time: 12 minutes**

**Volunteer performance reviews offer numerous benefits to volunteers and to the parks they serve.**

### **T-3: Key Concepts**

### **H-1: Key Concepts**

### **T-5: Benefits of Performance Reviews**

**Ask participants** to share what they see as benefits for the agency and for the volunteer to be involved in performance reviews. (Add from **T-5** any that they fail to mention.)

#### **Benefits of Performance Reviews:**

1. They are a way to tell volunteers they are important and that both volunteers and organizations are held accountable to their agreements.
2. Volunteers want to be successful and usually respond well to feedback.
3. It is a good time to express appreciation for volunteer efforts and acknowledge accomplishments.
4. Enables the volunteer and park supervisor to renegotiate their working agreement with one another.
5. It provides an opportunity for plans to be made to improve volunteer performance in the future (e.g., training, new placement).
6. Allows volunteers to express concerns and “escape” an unfavorable situation.
7. Allows staff to share concerns and “dismiss” a volunteer if the situation requires that action.

## **T-6: Barriers to Performance Reviews**

### **Optional Activity:**

If participants are expressing resistance to utilizing volunteer performance reviews, problem-solve to assist them in breaking through their barriers.

### **Ask participants:**

“What are some potential barriers your park will need to overcome to do performance reviews successfully?”

### **Barriers**

Our paid staff isn't reviewed

No policies on reviews  
for volunteers

Current volunteers are  
resisting the idea

### **Strategies to Overcome**

Suggest this be initiated first

Institute policies on  
performance reviews and  
dismissal

Involve them in developing  
the form and process

## CONCEPT 3

**Time: 8 minutes**

**At the heart of a good volunteer review is a shared understanding of job expectations and outcomes.**

### **T-3: Key Concepts**

### **H-1: Key Concepts**

### **H-3: The Volunteer Performance Review Process**

### **T-7: Volunteer Performance Review (Before the Session)**

### **T-8: Volunteer Performance Review (During the Session)**

### **T-9: Volunteer Performance Review (After the Session)**

### **H-4: Volunteer Self-Assessment Forms**

### **H-5: Ideas for Evaluation Questions**

Review the following process for performance review.

#### **Before the Session**

1. Have the volunteer fill out self-assessment
2. Review volunteer's job description/goals and evaluate performance versus job expectation
3. Do an evaluation on the job expectation versus performance

#### **During the Session**

1. Together, review the agreed-upon job expectations
2. Share positive feedback and give appreciation for service
3. Volunteer shares self-assessment and assessment of agency support
4. Give assessment of volunteer's performance
5. Discuss any barriers that volunteer experienced in carrying out the position
6. Discuss future plans for the volunteer in the park (position, goals, etc.)

#### **After the Session**

1. Write a report for volunteer's file
2. Follow up on any action plans or agreements made

If applicable, share **H-4** and **H-5** to explore possible forms/questions to use in, or adapt to, your volunteer program.

## CONCEPT 4

**Time: 10 minutes**

**Outcomes from volunteer performance reviews can range from applause to dismissal — by either the VIP supervisor or by the volunteer.**

### **T-3: Key Concepts**

### **H-1: Key Concepts**

### **T-10: Possible Reasons for Low Volunteer Productivity/Morale**

#### **Presentation:**

One way to keep volunteers continually involved in your park is to take the opportunity of performance reviews to discuss a volunteer's readiness for a new challenge, need for a change or break, etc. If there has been low productivity or morale on the part of the volunteer, it is important to discuss remedies.

#### **Activity to uncover productivity or morale problems:**

Ask group to share possible reasons for low volunteer productivity or morale. The following may be some of the possible responses:

1. Boredom: too much routine
2. Discontent; personality differences
3. Idleness: fluctuating workload, insufficient staff
4. Lack of interest in the work
5. Ill-defined assignments
6. Inadequate supervision/training
7. Misunderstanding of policies and their purposes
8. Resentment, overload, unrealistic deadlines
9. Poor communication within work team (staff/volunteers)
10. Emotional stress and personal difficulties
11. Erratic participation
12. Lack of appreciation
13. Staff and park changes
14. Staff resistance to utilizing volunteers

## **T-11: Dismissal of Volunteers**

### **Activity:**

Ask participants to divide into small groups to identify possible remedies to specific morale problems.

### **Comment on Dismissal:**

(Remember: It may be initiated by the volunteer or the park.)

(1) The volunteer may choose to leave the park for any number of reasons.

(2) The park may dismiss volunteers due to non-adherence to rules and procedures or due to continued unsatisfactory performance after progressive warnings have taken place.

Share/review your park's policies and procedures regarding dismissal, whether initiated by the park or the volunteer (e.g., exit interviews, dismissal procedures, etc.)

## **T-12: Exit Interview Outcomes**

### **H-6: A Suggested Exit Interview Form**

### **Volunteer Initiated Departure**

It is advisable, whenever possible, to have an exit interview with a volunteer leaving the organization. You can gain a great deal of information which can serve other purposes:

- Tracking
- Recognizing and thanking volunteers
- Locating problems within specific areas (e.g., many volunteers staying a short time/leaving early)
- Detecting any recruitment problems (e.g., accepting someone who is not appropriate for the job)
- Hopefully minimizing any bad feelings caused by the park/agency
- Providing closure to the relationship

## **T-13: Volunteer Dismissal**

## **H-7: Dismissal of Volunteers**

## **H-8: Volunteer Termination**

## **H-9: How to Fire a Volunteer**

## **Volunteer Dismissal by Park**

It might be difficult to imagine yourself firing a volunteer, but there clearly are situations when it must be done, for the sake of fellow volunteers, of paid staff, of park visitors, and/or of the resource.

Remember, however, that volunteers must be clearly informed of their roles and responsibilities through clear job descriptions. They must also understand, from the very beginning, that certain standards and expectations must be met for the success and continuation of the relationship between the volunteer and the park.

### **Essentials of Firing Volunteers:**

1. As part of their orientation, each volunteer should receive a copy of the park policies on termination, including a policy on suspension and grievance procedures. This provides volunteers with forewarning that volunteers can be terminated. It also assures salaried staff that volunteers can be dismissed from the organization.
2. With few exceptions (e.g., observed harm to visitors, theft, etc.), volunteers should not be fired until you have had an opportunity to conduct an in-depth investigation, making certain that you have proof of violation of park policies or performance standards. You may choose to suspend the volunteer while the investigation is taking place. Determine if there are any excusable or extenuating circumstances, and always document, in writing, your investigation and conclusions. It is advised that you confirm the termination in writing with the volunteer.
3. Firing volunteers should be handled fairly and with utmost diplomacy. Don't apologize for your decision.
4. Provide notification to appropriate paid staff and other volunteers that the volunteer will no longer be working at the park.

## **SUMMARY/WRAP-UP/EVALUATION**

**Time: 3 minutes**

### **T-3: Key Concepts**

### **T-4: Essential Elements of Volunteer Performance Reviews**

### **H-1: Key Concepts**

Review key concepts and key elements of performance reviews.

**END 60-MINUTE TRAINING**



## **SUGGESTIONS FOR EXPANDED ACTIVITIES**

1. The length of time to cover this topic will vary greatly depending on participant's comfort level and experience. If you are simply wishing to suggest that performance reviews be adopted, you may wish to cover concepts 1 and 2 to get buy-in and input on the first session and concepts 3 and 4 in a second session which focuses on the "how-tos."
2. If there is resistance by current volunteers to the introduction of performance reviews, it would be advisable to have a session with them to expose them to the mutual benefits of the process and solicit their ideas for a process that would be effective and acceptable in your organization.
3. If you are devoting most of the session to "selling" the concept of performance reviews for volunteers, you may wish to break people into small groups and have them share any positive personal experiences they have had related to personal growth coming from the experience of having a performance review.

## RESOURCES

1. Graff, Linda L. *Yes You Can!: Discipline and Dismissal of Volunteers, An Audio Workshop*, Graff and Associates, 1999.
2. Lee, Jarene Frances, with Julia M. Catagnus. *What We Learned (The Hard Way) About Supervising Volunteers: An Action Guide for Making Your Job Easier*, Energize, 1998.
3. MacKenzie, Marilyn. *Dealing With Difficult Volunteers*, Heritage Arts Publishing, 1998.
4. Maddux, Robert. *Effective Performance Appraisals*. Order from Crisp Publications, Inc., 95 First Street, Los Altos, California 94022.
5. McCurley, Steve and Rick Lynch. *Volunteer Management: Mobilizing All the Resources in the Community*, 1996. Order from Heritage Arts Publishing, 1807 Prairie Ave., Downers Grove, Illinois 60515.
6. McCurley, Steve and Sue Vineyard. *Handling Problem Volunteers: Real Solutions*, Heritage Arts, Publishing/VM Systems, 1998.